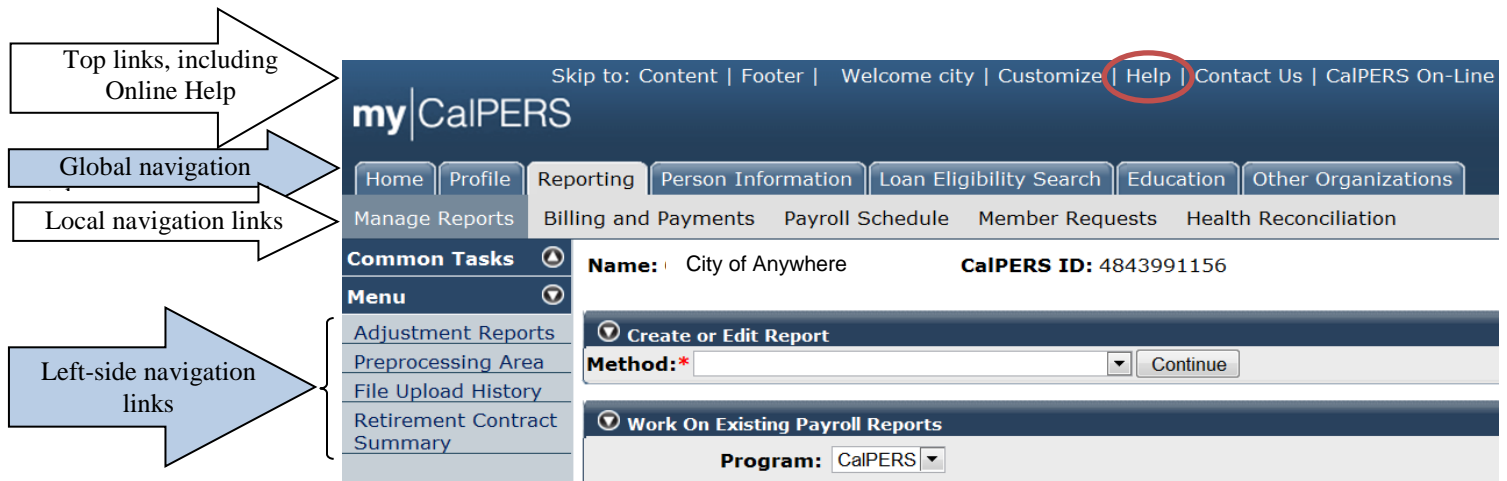


my|CalPERS Online Data Entry Help Sheet for Membership and Payroll



my|CalPERS Navigation

- **Online Help:** Provides detailed information and required steps needed to utilize my|CalPERS
- **Global Navigation Tabs:** Provide access to high level functions within my|CalPERS
 - **Profile Tab** – employer demographics, contacts, business relationships, contracts, and agreements
 - **Reporting Tab** - reporting retirement enrollments, health enrollments, and payroll transactions
 - **Person Information Tab** – search for person details by SSN or CalPERS ID
 - **Other Organizations Tab** – general PERS-related information
- **Local Navigation Links:** Provide access to specific pages within my|CalPERS
- **Left-Side Navigation Links:** Provide supporting access or access to common tasks
- **Multiple Browser Windows:** *e.g. one for query, one for processing transactions*
 1. Right click on any of the global navigation tabs.
 2. From the pop-up dropdown, select *Open in New Window*.
 3. A separate browser window will open.
- Selecting the **Home** global navigation tab, or the top-left **my|CalPERS** link, will refresh the data. It's important to refresh when performing a query or new transaction for a different Participant. This is not necessary is when working with the **Reporting** global navigation tab.
- The Internet browser **Back arrow** or **Backspace key** will return you to the previous screen; however, it might create an occasional error page, especially after you save your transaction.

Retirement Transactions

Within the **Reporting** global navigation tab, there is a section called *Create or Edit Report* (see above screen shot). Select one of the following options to perform retirement transactions for qualified members or Retired Annuitants:

- **Add Retirement Enrollment:** submit a new appointment
- **Edit Retirement Enrollment:** submit appointment changes or separations

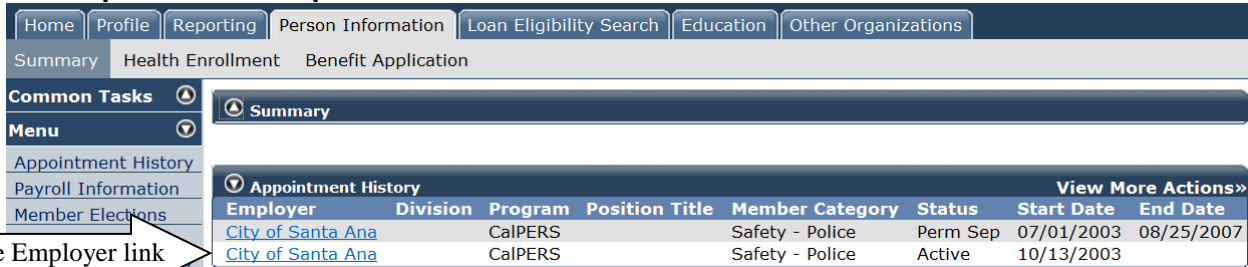
Retirement Quick Tips:

Add New button: Use to process a new transaction (not necessarily a New Enrollment)**Retirement Transactions (continued):**

my|CalPERS Online Data Entry Help Sheet for Membership and Payroll

Retirement Quick Tips (continued):

- **View a processed or updated transaction:**



Home	Profile	Reporting	Person Information	Loan Eligibility Search	Education	Other Organizations
Summary	Health Enrollment	Benefit Application				
Common Tasks						
Menu						
Appointment History						
Payroll Information						
Member Elections						
Appointment History						
View More Actions»						
Employer	Division	Program	Position Title	Member Category	Status	Start Date End Date
City of Santa Ana		CalPERS		Safety - Police	Perm Sep	07/01/2003 08/25/2007
City of Santa Ana		CalPERS		Safety - Police	Active	10/13/2003

1. Select the **Person Information** global navigation tab.
 2. Enter the employee's CalPERS ID or Social Security number in the SSN/Federal or Individual Tax ID field, and then select the **Search** button.
 3. Select appropriate (if more than one appointment listed) *Active* appointment status **Employer** link.
- **Permanent Separation:** After a Permanent Separation is processed, a letter explaining the member's options will be sent automatically. If the member wants to refund, they can download the refund package or request that it be mailed to them.

Payroll Transactions

Within the **Reporting** global navigation tab, there is a section called *Create or Edit Report*. To perform payroll transactions for qualified participants or Retired Annuitants, select one of the following options:

- **Copy Prior Posted Payroll Report:** Use a prior posted report within my|CalPERS to add, update, or delete payroll records for an earned period
- **Manually Enter Payroll Records:** Manually enter new payroll records for an earned period

Payroll Quick Tips:

- **Copy Forward:** Copy a previous payroll file by selecting the "Copy Forward an Existing Payroll" option in the Method dropdown
- **Payroll Validation:** All submitted payroll files will go through two levels of validations to ensure data submitted meets CalPERS business requirements.
 - An error-free file will be posted and can be viewed on the *Manage Reports* page
 - Files found with errors will be held within a *Preprocessing Area* for further review
- **Payroll Reports:** Employers can also generate the following reports:
 - **Generate Report Summary:** Provides report and record statistics, and financial summary information
 - **Generate Missing Payroll:** Provides details regarding missing payroll records for active participants
- To view the current fiscal year contributions submitted and payments made, start at the *Billing and Payments* local navigation link under the **Reporting** global navigation tab.
- To view/manage payroll schedules with associated payroll due dates and request payroll extensions, start at the *Payroll Schedule* local navigation link under the **Reporting** global navigation tab

my|CalPERS Online Data Entry Help Sheet for Membership and Payroll

Making Payment Transactions

Within the **Reporting** global navigation tab, there is a section called *Billing and Payment* where employers can view billing and payment summary information by Fiscal Year and make payments to their total obligations.

Make Payment Quick Tips:

- **Additional financial information:** Can be obtained by selecting one of the following hyperlinks:
 - **View Contributions Details:** Provides detailed information for an earned period broken down by participants and provides transaction type, earnings, and contributions information
 - **View Payment Details:** Provides information related to the authorization date, amount paid, status, and receivable description
- **Contributions:** my|CalPERS will break out contributions by Defined Benefit Plans (and Health and/or SIP, if your agency contracts for those as well)
- **Two online payment options:** (*Note: Both debit and credit payments will be viewable in my|CalPERS*)
 1. **Debit method:** Employers will authorize payments via my|CalPERS
 2. **Credit method:**
 - a. Employers will initiate and authorize payments through their financial institution.
 - b. The employer must notify the CalPERS Fiscal division.
 - c. This method is not set up via my|CalPERS, nor are payments paid using my|CalPERS.

Help Options:

- **Online Help:** Select **Help** link at top of page, and then select **Index** to do keyword search by topic
- **Call CalPERS:** Call toll free at **888 CalPERS** (or 888-225-7377)
- **Review the computer-based training (CBT) courses:** Register for courses from the PERT area of CalPERS On-Line
- **Email CalPERS:** Select **Ask CalPERS** within CalPERS On-Line

Note: In order to protect the confidential information of our members, **do not** include a Social Security number in your email or your inquiry will not be processed.

- **Submit an “Inquiry” within my|CalPERS:** Allows *confidential* information (such as SSNs, employee enrollment details, etc.) to be transmitted securely, and will be assigned to CalPERS staff to work.
 1. Select the **Common Tasks** left-side navigation heading.
 2. Select the **Submit Inquiry** local navigation link.
 3. Submit your Inquiry.
 4. CalPERS staff will review and respond to the Inquiry.
 5. You will be sent an email notification when the response is available.
 6. Select the **Inquiry List** local navigation link to view the response.